

Strategic Plan
APICS CHICAGO CHAPTERCHAPTER

FYs 2004-2005 through 2006-2007
Three-Year Strategic Plan

VISION:

The Chicago Chapter of APICS is the preeminent professional association of supply chain management personnel.

MISSION:

The Chicago Chapter of APICS will be the foremost provider of learning services, enabling its members and associates to differentiate themselves in the arena of Supply Chain Management, by providing continuing professional development through networking and professional education.

HISTORY OF THE CHICAGO CHAPTER:

When APICS (American Production and Inventory Control Society) was organized in 1957, the founding members were focused on creating a professional society dedicated to raising the educational level and, therefore, the business stature of production and inventory management practitioners.

The initial educational efforts were committed to developing and presenting first class annual national conferences. As Chapters evolved and flourished, their focus was to develop monthly programs that would help foster the educational knowledge and business awareness necessary for personal growth. Chapters soon realized that there was a need to create and present educational programs/classes to supplement the monthly meetings. The Chicago Chapter was organized and chartered on September 1, 1959. The Chapter was fortunate to have attracted a small, but influential group of pioneers in the area of P&IC (Production and Inventory Control). Early Chicago Chapter members formed a nucleus of dedicated individuals who worked together to create some of the earliest and best educational materials to eventually become the APICS BOK (Body of Knowledge) foundation upon which the Society has grown. The Chapter itself also grew to become one of the largest in the entire APICS global organization with some 2700 members at its peak. It has boasted over 36 highly qualified instructors and a dedicated Board of Directors with 40 participants.

A regional structure (Chicago Chapter XIV belongs to Region XIII which includes all 14 of the Chapters in the states of Illinois and Indiana) was created in 1964. The structure consisted of seven regions in the United States and one region in Canada. Presently there are fourteen North and Central American regions, 269 Chapters and 30 international APICS affiliates with a global membership of some 50,000 students, academics and professionals. In 1965, Region I (New England) organized one of the first regional seminars at Boston College. Today, regional seminars have become an established educational practice throughout the society.

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STRATEGIES:

1. Maintain a strong financial base in order to be able to provide the resources necessary to maintain the Chapter's platinum level performance.
2. Focus Chapter resources on increasing the value delivered by the Chapter to its membership.
3. Properly size the Board of Directors and/or sub-committees so as to reduce burden on individual volunteers while maintaining the ability to deliver a high level of service to Chapter members. Strive to keep separate activities coordinated.
4. Expand and extend Chapter membership (professional, corporate and student) from a diverse, geographic (within Chapter boundaries in Northeastern Illinois and Northwestern Indiana), demographic, and cross-functional basis.
5. Recognize the need for and continue to foster a broad base of volunteers that includes active Board members, sub-committee members, advisors, instructors and others that keep the chapter operating.
6. Build APICS awareness in the Chicago area

OBJECTIVES

The objectives for FYS2004-2005 through and 2006-2007 are to:

1. Professional Development
The Chicago Chapter will meet this objective by acting as a focal point for its members to grow personally and professionally by extending an array of value-added services, which meet their current, and future needs. Programs will be topical, relevant, and compelling to members.
2. Networking
The Chicago Chapter will meet this objective by creating an environment in which its members, non-members and associates can seek information, jobs, jobs and business opportunities. The Chapter may serve as a springboard to finding a better job and by developing relationships that can enhance their business relationships.
3. Professional Differentiation
The Chicago Chapter will meet this objective by 1) creating APICS awareness within corporations, 2) ensuring the quality and content of APICS offerings are highly regarded within industry, 3) providing the ongoing opportunity for certification, and 4) providing opportunity for recognition as subject matter expert.
4. Information Resource (Passive)
The Chicago Chapter will meet this objective by; A) creating new outlet channels for locally developed information and research B) increasing awareness of information available from APICS Society, while encouraging and supporting its usage.
5. Employment Resource
The Chicago Chapter will meet this objective by; A.) Providing Chapter members access to local job postings and other employment tools. B.) Providing local commercial entities a single point of contact to find local APICS professionals.

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6. Certification Education

The Chicago Chapter will meet this objective by offering a regular and predictable series of certification review and test preparation courses for CPIM and CIRM candidates at geographically convenient locations.

7. Certification Maintenance

The Chicago Chapter will meet this objective by assisting certified members in tracking and earning certification maintenance points.

8. Skills Assessment

The Chicago Chapter will meet this objective by developing a list of specific skills needed for positions related to supply chain management (production planning, inventory control, warehousing and distribution) needed in both manufacturing and service industries.

TACTICAL PLANS:

BOARD OF DIRECTORS (BOD)

- Review and update applicable portions of By-laws where necessary.
- Establish a three-year executive committee succession plan that introduces two new members per year.
- Solicit and then maintain a list of potential new volunteers.
- Create advisory, non-voting position(s) on the BOD to be filled by one or more of the Chapter's sister associations (such as ISM/NAPM and PMI).
- Leverage the Chapter website's current and future functionality to reduce the day to day burden of running the Chapter by volunteers.
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FINANCE

- Annual budgets will be developed by each chair, presented to the BOD for approval and the board will monitor activities to determine whether expenses/receipts fall within budget during actual operations.
- Maintain a healthy Chapter financial position with cash reserves equivalent to 6 months of average annual projected expenses.
- Continue to meet financial obligations within 30 days of receipt of invoice or completion of class time.

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QUALITY (Passport Program)

- Continue to ensure Chapter activities are coordinated and meet platinum level requirements.
- Set-up, maintain, and periodically review a comprehensive milestone chart with all passport and Chapter time-phased in conjunction with the current board year.
- Provide a rolling 30, 60 and 90-day view of upcoming requirements and critical milestones at each Board of Directors meeting.
- Establish an ongoing and detailed bi-annual Passport Program status review process.

MARKETING

- Provide annual SWOT review and analysis as in Appendix A to this document and submit updates to BOD for discussion and approval.
- Increase APICS brand awareness in job ads as measured by an increase in the number of “mentions” in job postings; add one-to-one marketing effort by contacting companies with these job postings.
- Increase APICS brand awareness among recruiters in the Chicago area.
- Expand corporate education program through a broad marketing effort to key contacts in area companies.
- Participate in selected area Trade Shows to extend brand awareness to “non-practicioners” and non-members.
- Expand marketing efforts to reach non-practitioners and non-traditional industries (distribution, healthcare, retail)
- Introduce brand advertising in professional journals in order to increase brand awareness.

COMMUNICATION

- In conjunction with other functional chairs, develop an annual communication plan in support of their efforts and activities.
- Enter the annual “Fit-to-Print” APICS Society competition.
- Increase the amount of educational content in each issue to 75% with the remaining percentage devoted to Chapter/society communications.
- Leverage available resources in preparing articles and essays for publication in the Chapter Newsletter.

PROGRAMS

- A minimum of six (6) Professional Development Meetings (PDMs) will be held during the fiscal year.
 - A minimum of one (1) PDM will be held in joint with another organization.
 - A minimum of one (1) PDM will be held in joint with another APICS Chapter.
- A minimum of two (2) facility tours will be held during the fiscal year
- A minimum of two (2) workshops, seminars and/or other structured events (e.g., symposia, kaizen events, simulation experience, etc) will be held during the fiscal year
- As appropriate, Programs will look to combine activities (e.g., plant tour and dinner meeting) to provide greater context and therefore a potentially more meaningful experience for attendees.

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- Measurements:
- A redesigned satisfaction questionnaire will be passed out at PDM events starting after Jan 1, 2005
 - A survey will be designed and administered after January 1, 2005 to effect an understanding of member preferences relating to the following topics, both separately and in combination: formats; food offerings; pricing; meeting lengths; meeting times (i.e., breakfast, lunch dinner); venue.
 - Anecdotal feedback to and from BOD members.

EDUCATION

- Meet with and build education alliances with Region XIII and other chapters – one common course per fiscal year
- Develop one workshop from list below for Q2, 2005
- Conduct one TTT course as a chapter or with other chapters per fiscal year
- Conduct one LDI course as a chapter or with other chapters per fiscal year
- Add one new instructor to our faculty per year
- Contact and develop meaningful relationships with colleges
- Develop alternative course/workshop scheduling: One –day, Two-day, Six-week, Once-a-week for three weeks, breakfast, lunch
- Add four (4) new corporate customers
- Conduct a special appreciation In-house dinner
- Conduct an Instructors Appreciation Dinner

Measurements:

- Contact all past and current In-house customers each fiscal year
- Conduct an instructor meeting in Q1 of 2005
- Spring Program announced by December 15, 2004; Fall Program by March 1, 2005
- Establish a valid instructor development and evaluation program
- Conduct no less that the same number of In-Houses courses than the last fiscal year
- Reduce the cancellation of Public Classes
- Target a minimum attendance of 15 students for a Public BSCM Course
- Recognize new CPIMs/CIRMs/ Certification Maintenance
- Recognize company with the best practices/results re APICS BOK Operations Management

MEMBERSHIP/COMPANY COORDINATION

- Offer “rediscovery” workshops to encourage disinterested and/or non-renewing members to re-enlist. Use these forums to obtain feedback for improved service offerings.
- Send a newsletter quarterly to non-active members.
- Plan one social outing each year, such as a golf outing.
- Develop a mentor program to connect members with students.
- Use PDM incentives (discounts, give-aways) to attract new members and non-renewing members.
- Recognize recent certification graduates and encourage them to maintain their memberships.

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- Establish a Student Advisory Council to allow past education participants to provide feedback for future educational offerings.
- Conduct a yearly membership survey.
- Establish an on-going membership recognition program.
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ACADEMIC LIAISON

- Develop a yearly student chapter assessment that includes a review of the Student Management Program
- Maintain funds for scholarships, the International Conference Scholars program, Student Leader APICS memberships, Fogarty competition, and other programs as approved by the BOD.
- Launch an APICS mentor program within the Chapter by 2006.
- Partner with Region XIV for Student Case Competition
- Support a student mentor program

Measurements

- Student membership numbers, beginning & end of year
- # of student chapter activities held per semester/quarter at each campus

SWOT ANALYSIS

STRENGTHS:

- Strong and diverse education program
- Instructor base
- Platinum award winner 11 years in a row
- Experienced and dedicated volunteers
- Website
- Cash Rich
- Resource Material
- Society
- Brand
- E/R Developed Materials
- Institutional Base
- Large Geographic Region (large market)
- Automated Transaction Process

WEAKNESSES:

- Member base covers large geographic area (also a strength)
- Southland needs development
- Development & Recruiting Volunteers
- Courseware-quality & current relevance
- Retention a) members b) volunteers
- (Relevancy Flexibility Attract –A&R)
- Succession Plan
- Society/Support

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- Student Chapters
- Org Vacancy
- Customization/Tailorization
- Product Development
- Market Development
- Class/PDM registrations dropping
- Diversity
- Real voice to customer

OPPORTUNITIES:

- Increased member need for Certification Maintenance points
- CIRM modification/value of - clear strategic intent
- Financial opportunities to grow the Chapter's business and offerings.
- On-site education market
- Student Chapters/Future leaders/Future members
- Large, diverse base of potential and current members
- Partnerships and opportunities to share resources with the other Chapters within Region XIII
- Create a consortium of resource related associations (NAPM, PMI, CLM, IIE and other affiliated associations) to construct a platform whereby common interests can be identified along with opportunities to share resources.
- Engage with Region 13 and Society by participating in activities and teams to influence policies and strategies that have a Chicago Chapter imprint
- Quality Speakers
- (Media development Product endorsement)>broad concept
- Media-delivery mechanism
- Partnership with "sister" Assoc (ASQ, PMI, CLM, ISM, IMA)
- Education Partnerships with Institutions
- Education Partnerships with Corp Universities
- Certification Maintenance
- Partnerships with Chamber of Commerce
- Grant

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THREATS:

- Not enough Chapter resources for one-on-one sales efforts
- Continued financial stability of the Chapter
- Not perceived as meeting the needs of our customers
- Time poor environment (limited resources)
- Many higher education institutions in the area (also an opportunity)
- Large concentration of APICS related consultants in area (also a strength)
- Society taking market share within the Chapter's geographic area
- Geographic disbursement of membership
- Career migration
- Lack of Corporate support
- Society-support & competition
- Macro-economy
- Mfg outsourced
- Competition
 1. other Associations
 2. Corp universities
 3. consultants
 4. Educational institutions
- Grant dollars
- Other Chapters
- Work/Life balance